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ABSTRACT

The flight of middle class families from the cities to the suburbs has left many cities hard pressed to continue services at former levels. Falling enrollments and revenues have led to mergers of city and county school districts or closures of city districts followed by county takeover. This report documents educators' experience of city-county school consolidation, with special attention to educator morale. Administrators of five North Carolina and Tennessee school districts that had undergone consolidation completed a preliminary questionnaire. Teachers and administrators from five consolidated districts in North Carolina, Kentucky, and Tennessee took part in hour-long telephone interviews based on the questionnaire. Five key factors affected or reflected educator morale before or during consolidation: (1) the extent of planning and of educator involvement in the planning process; (2) communications about consolidation; (3) fears about job security, transfers, inequitable treatment, and loss of benefits and special programs; (4) the actual events that occurred during implementation; and (5) educator grievances and departures. The districts surveyed ran the gamut from minimal loss of educator morale to major trauma for educators. Recommendations for educators and community members facing consolidation include: (1) extensive planning that involves boards of education, educators, and community members from both districts; (2) extensive communications among all interested parties to counteract rumors and groundless fears; and (3) strong leadership from superintendents and community leaders. This report contains 15 references. Appendices include the survey instruments, and merger chronologies for Charlotte and Mecklenburg County (North Carolina), Nashville and Davidson County (Tennessee), Winston-Salem and Forsyth County (North Carolina), Louisville and Jefferson County (Kentucky), and Knoxville and Knox County (Tennessee). (SV)



TEA-AEL

Maintaining Positive Educator Morale During Consolidation

A Joint Study by the

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Nashville, Tennessee 37219**

and the

AEL

**Appalachia Educational Laboratory
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May 1989

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Washington, D.C.***

The Appalachia Educational Laboratory (AEL) is located in Charleston, West Virginia. Its mission is to work with the Region's educators in an ongoing R & D-based effort to improve education and educational opportunity. To accomplish this mission AEL works toward:

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- the improvement of curriculum and instruction,
- the improvement of community support, and
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Abstract

The Tennessee Education Association and the Appalachia Educational Laboratory jointly sponsored during 1987-88 a study group of five teachers who examined the issue of educator morale during city-county school consolidation and developed this product for use by educators considering consolidation. As a guide to avoiding rumor mills and entrenched opposition, "Maintaining Positive Educator Morale During Consolidation" describes the events that occurred in the consolidation of five districts and common factors that affected educator morale. On the basis of written and telephone surveys of educators in selected southern school districts that have consolidated, the study group makes the following recommendations:

- **Planning**, the most important factor in a smooth consolidation, should include outlining legitimate reasons for consolidation; mutual planning by the school boards involved at least a year in advance of consolidation; a planning group that involves community members, teachers, and principals, as well as central office staff and consultants if needed; a detailed timetable for making necessary changes; provi-

sion for equitable treatment of all parties; inclusion of the "best of both" previous districts; and avoidance of duplicate positions.

- **Communications** are the second most important factor in maintaining positive education morale during transition. Meetings should be held with the community and with district personnel for their input and involvement in the planning. Detailed communication concerning planning for consolidation should begin well before the fact and continue until the consolidated district is well accepted. The study group recommends that school boards, administrators, teachers, and professional organizations work proactively with all the media. It may also be advisable to set up a consolidation hotline and to schedule counseling sessions for educators and students with human relations specialists.

- **Leadership** is needed throughout the consolidation process from superintendents, community or professional association leaders, and from educators generally, especially to deal with fears of consolidation that may arise in the consolidating districts.

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Introduction

What Is a Study Group?

AEL seeks to provide professional development opportunities to educators by working with and through their associations. Since 1985 one way the Classroom Instruction (CI) program has assisted teacher associations is through the creation of jointly sponsored study groups. AEL's purpose for a study group is to assist educators in conducting applied research and in making research-based knowledge available to educators.

A study group is composed of educators who conduct a small-scale study and produce a product that is useful to their colleagues. Associations and AEL jointly select topics for study groups, although the selection of members is handled by the associations. AEL staff participate in meetings as members of the study group and usually take a facilitative role. AEL provides a small grant to the association to assist with study group expenses, but the association or individual members generally make in-kind contributions that far exceed the AEL grant. AEL provides additional services, such as editing, layout, and typesetting of the group's product. The responsibility for dissemination lies with both AEL and the association, with the association making the product available to its members and AEL publicizing it and disseminating it within a four-state Region (Tennessee, Kentucky, West Virginia, and Virginia) and nationally.

Focus of the Study Group

During the summer of 1987, meetings between Tennessee Education Association (TEA) and AEL Classroom Instruction (CI) program staff led to formation of a study group of Knox County teachers. The purpose of the study group was to document educators' experience of city-county school consolidation, especially the effects

on educator morale. It was centered in Knoxville and Knox County because teachers there had an urgent interest in the subject. The Knoxville school system ceased providing services at the end of the 1986-87 school year, and the study group members were facing their first year as staff of a unified Knox County school system.

In this study, the words "consolidation" and "merger" are used virtually interchangeably. The legal term when two or more districts become a single, unified school district is "merger." "Merger" is used in this document when it is appropriate to emphasize that the consolidation process involved school districts rather than schools. However, more frequently the group chose to use the more generic term, "consolidation," in part because two of the five school districts surveyed in-depth did not "merge" in the legal sense of the term. In these cases the city district simply closed, and the existing county district assumed the responsibilities of the former city district. Moreover, the issue of morale, the focus of this study, is one that affects consolidation within districts as well as between districts. The morale issues discussed in this publication may affect educators and communities involved in school consolidation, as well as those involved in district mergers. The broader term, "consolidation," covers both types of situations.

The Issue of Educator Morale

At its first meeting, the study group decided to focus on the issue of maintaining and improving educators' morale during the frequently stressful period when two separate school districts become one. Not only was morale an issue of immediate practical concern to the study group members, but it is an area of school life over which teachers can expect to exert some control.

Not only educators in Knox County but educators in many school districts need informa-

tion on the effects of consolidation and how educators can ease the transition. In any major change that threatens current programs and benefits, morale is almost sure to suffer. Ultimately, if the change is handled creatively, the system may be improved and morale actually enhanced. But some loss of morale is virtually inevitable before and during school district consolidation—or school consolidation.

The number of educators and communities threatened with loss of individual schools because of shrinking enrollments is even greater than those threatened by district merger. Those parts of this study that deal specifically with educator morale should be of interest to educators in any district where district merger or school closings are a possibility.

Several respondents to the study group's surveys mentioned in passing that consolidation of school districts also required the two teachers' associations to consolidate. In two cases, the respondents felt that the association mergers went more smoothly than the school district mergers; in a third case, a teacher reported that the merger of the two associations was tense. Even in that case, however, NEA guidelines for the protection of human and civil liberties were followed.

Rationale for the Study

The literature on city-county school district consolidation is rather sparse, consisting of some case studies, some policy statements, and very few research studies. Considering the wealth of material on shrinking enrollments, retrenchment, reductions in faculty, and school closings, the lack of attention to district consolidation is rather surprising.

There are signs that school districts may increasingly come under pressure to merge with other districts. The North Carolina Manual for Merger (Bridgman, 1987) points out that demographic pressures are changing. When most city districts were established, the wealth of the community was usually concentrated within the city limits, as were the middle class families who were willing to tax themselves to improve their children's educational opportunities. Special city school levies were passed to ensure enriched

programs in the city school districts.

Since World War II, industry as well as middle class families have left most cities for the suburbs. Now, it is frequently the county or suburban school districts that have the relatively wealthy constituencies pressuring them for better services. The cities, losing income, are hard pressed to continue the level of services they have established. This demographic trend is reflected in the survey data of this study. Two of the city school districts studied were abolished because city revenues were no longer adequate to operate schools.

Only one of the four states in the AEL Region is unaffected by this demographic pressure for city-county consolidation. In West Virginia, all school districts are already organized on a county basis. In the other three states (Tennessee, Kentucky, and Virginia), many school districts have already been consolidated, and others are under pressure to consolidate. Educators in school districts that may consolidate need to understand the issues involved and the experiences of others who have already lived through consolidation, in order to take a proactive role in the change process.

Federal and other monies were available to ease the transition for some of the earlier mergers in this study, especially those undertaken in part to facilitate school desegregation (Levine and Eubanks, 1986; Lucas, 1976; and Schmandt et al., 1977). Decreasing enrollments and loss of funding appear to have been major factors in more recent mergers (Bridgman, 1987; and Moray, 1985).

Design of the Study

After a review of the literature, the study group designed a questionnaire on consolidation, which they sent to superintendents of seven southern school districts that had undergone city-county school consolidation. These districts were chosen on the basis of literature review and verbal referrals. Staff of five school districts responded to this written survey: Cumberland County Public Schools, NC; Forsyth County Public School, NC; Charlotte-Mecklenburg Schools, NC; Metropolitan Public Schools (Nashville/Davidson County, TN); and Wake County

Public Schools, NC. A copy of the survey is found in Appendix A.

On the basis of the information generated by this survey and a survey of Knox County school faculties, the study group members designed a telephone survey instrument to allow them to gather in-depth perceptions of selected educators. In the original written survey, respondents were asked to list the greatest obstacles and the greatest accomplishments and benefits of consolidation. The list of obstacles was incorporated into the telephone survey and has been incorporated into this report. The telephone survey form is included as Appendix A.

Study group members conducted hour-long telephone interviews with teachers and administrators in five school districts, including two not represented in the response from the written survey: Jefferson County Public Schools, KY, and Knox County Public Schools, TN. Each study group member agreed to conduct telephone surveys with two people, usually one teacher and one administrator, nominated from one of the districts. The following discussion is based on information from both the written survey and the telephone survey. The term "in-depth" is used throughout the document to refer to data from the telephone survey. School districts and all respondents were assured that their responses would be pooled with those from other districts, so that anonymity would be maintained.

In each case, the district superintendent designated for telephone interviewing an administrator who had been integrally involved in the consolidation process, and the president of the local National Education Association (NEA) affiliate designated a teacher for a similar interview.

The study group then analyzed the data,

divided the writing tasks, and individually drafted sections of the publication. AEL staff composed some sections, edited, and typeset the study group's product. In addition to publicizing and disseminating *Coping With Consolidation* at cost within its four-state Region and the nation through the Lab and Center network, AEL provided camera-ready copy to TEA for dissemination of the document to TEA members.

Clearly, it is impossible to generalize on the basis of information from so few respondents in each district studied. The limitations of such a small sample of respondents are reflected in the following incident. The administrator from one school district reported that teachers and principals were not involved in planning for consolidation, while a teacher from the same district reported that she had been the teacher representative on the planning committee, but that the district had failed to implement most of the committee's recommendations.

We hope that educators throughout the AEL Region will find this booklet helpful in deciding how to plan for and communicate during consolidation, when and if it occurs in their districts. It should be reassuring to read that a school district merger is not always a traumatic experience for those involved but can be an opportunity for improvement—for those who plan ahead.

Merger Chronologies

For each of the five districts surveyed in-depth, a chronology is given in Appendix B. Each chronology outlines the critical events that took place before and during the merger of the two school districts and was developed from information provided by the district and/or available from public sources.

Factors Affecting Educator Morale

 N the basis of results from their two written surveys, the study group identified five key factors affecting or reflecting educator morale prior to and during the consolidation process. These were: (1) planning (the amount of planning and the extent to which teachers and principals were involved in the planning), (2) communication about consolidation, (3) fears raised by consolidation, (4) the actual events that occurred during the consolidation process, and (5) the presence or absence of indicators of morale problems among educators prior to and during consolidation.

Planning

Respondents in the majority of districts surveyed by study group members indicated that planning was the most important factor in a smooth, successful merger. Most of the districts surveyed did extensive planning prior to the implementation of consolidation. Following are descriptions of the most common strategies reported.

Planning committees. In six of the eight districts surveyed, respondents described committees appointed by either city and county government or by the two school boards to study consolidation and make recommendations prior to development of a plan. One of these respondents, however, added that very few of the committee's recommendations were adopted in the eventual consolidation process. Some respondents did not mention planning committees, and one administrator said that while all segments of the community and many school personnel were involved informally, the consolidation was essentially unplanned so there was no time to set up planning committees. This respondent strongly emphasized the importance

of preplanning, even when there are severe time constraints. He said that planning is the key to a smooth consolidation.

Educator and student involvement. Respondents from three districts reported that teachers and principals were included on the planning committees that were appointed, and in one case the teachers' association took the lead in selling school consolidation to the community. Four of the five districts surveyed in-depth had some student involvement in the planning, according to written survey respondents. In most cases, however, students were involved primarily in public meetings; staff of only one district reported that students were represented on the planning committee. In the two districts where respondents reported substantial teacher-principal involvement in planning and implementing consolidation, there were smoother mergers than were reported in the other districts surveyed. In these districts, involvement appeared to reduce fears and increase communications.

Community involvement. Respondents in four districts reported that efforts were made to involve community representatives in the planning well in advance of consolidation. These efforts ranged from appointment of a blue ribbon committee to consultation with representative community groups such as the PTA, Chamber of Commerce, and professional associations. In two of these districts, the initiative for consolidation did not originate in the school district but in the community. The newspapers and the Chamber of Commerce took the lead in one community; in the other, the political power structure of the community.

Interim board of education. In three of the districts surveyed, an interim board of

education was appointed to work out the specifics of the consolidation process. Respondents reported that the appointment of an interim board made for an orderly transition and minimized the uncertainties staff had to face as the mechanics of merging the districts were worked out. When the districts were consolidated before these mechanics were worked out, respondents reported that there was considerable confusion as the plan was implemented.

The majority of teachers and administrators emphasized the importance of extensive planning and the importance of involving school personnel in the planning.

Communications

In analyzing the data from the five districts surveyed in-depth, the study group found that the districts employed a variety of ways to communicate information about consolidation.

Central office communications. Most of the districts made some use of public meetings (including PTA meetings), memos, letters, newsletters, and faculty/staff meetings to communicate information about the consolidation process. In two of the districts, the teachers who responded to the telephone survey reported that they felt the meetings for faculty and staff had not been effective in calming fears and giving staff the information they needed about consolidation planning. In one of these districts, the teacher respondent reported that all communications from central administration to the staff were ineffective in part, because there was a new superintendent who was unfamiliar with district personnel and history. In at least one of these two districts, central administrators instituted formal meetings with teachers throughout the first year of implementing the plan.

Community and professional organizations. In all five of the districts surveyed in-depth, community organizations and professional associations were active in publicizing the consolidation plans through public meetings, newsletters, and the like. In one case, community groups initiated the planning for consolidation. Conversely, in another district, both the

teacher and the administrator respondents reported that most of the public meetings in their community were held by citizens' groups opposed to the school district's plans. In the remaining three districts, community groups cooperated with the school district in publicizing the merger.

Teacher involvement. Memos, letters, and/or newsletters were used in virtually all districts surveyed. Teacher involvement in such communications ran the gamut from one school district in which little or no teacher input into this information was reported, to another in which teacher input was prominent. The teacher respondent from a third district reported that most of teachers' information about consolidation prior to implementation of the plan came from the teacher association newsletter rather than from central administration. In two districts where teachers reported that there was little teacher involvement in any of the communications about consolidation, respondents reported that a "rumor mill" had quickly developed. In one case, respondents reported that the rumors were spread primarily among teachers; in the other case, parents were also reported as generating and spreading rumors. While none of the districts surveyed for this study instituted a formal consolidation hotline, the study group found through literature review (Lucas, 1976) that some districts have instituted such a hotline and found it helpful in calming fears and countering misinformation.

Television. In each school district surveyed in-depth, respondents reported that television stations covered the merger as a news event. The extent of coverage depended on the amount of public controversy surrounding consolidation. In only one district, however, did respondents report that the school district secured television air time to disseminate information to the public.

Radio. As with television, radio stations consistently covered consolidation as a newsworthy event. Two of the school districts surveyed in-depth took the initiative to make extensive use of radio to explain and interpret the consolidation plan. Staff appeared on a number of question-and-answer radio programs and on

other "talk show" programs. Radio was the main media source of news about consolidation for one district.

Newspapers. Newspapers generally covered consolidation as news, with considerable coverage prior to merger and less afterwards unless there was continuing community controversy. Newspaper coverage tended to be in greater depth than television or radio coverage. On editorial pages, newspapers included opinions supporting or opposing the consolidation plan. In only one school district did a respondent report that the news coverage itself was slanted. In two of the five districts surveyed in-depth, respondents did not report whether the local newspapers took a position on the consolidation question.

Other. Respondents to the telephone survey were asked if their school districts had used any other kinds of communications to disseminate information about consolidation. Respondents in two school districts reported other kinds of communications. In one district, both respondents reported that various churches had provided more support for the plan than any other type of community group and that the local teacher association had found many ways of getting information out. Both before and after consolidation, the school district brought in a number of outside experts, including human relations experts, to work with staff and students to help them adjust to the change. In the other district, a wide variety of approaches had been taken, including soliciting support door-to-door by members of the teachers' association; having the Mothers Patrol (representing the PTA) take a strong stand in favor of consolidation; and having teachers operate a speakers' bureau for the PTA, various community groups, and churches. The teacher respondent in this district felt that the speakers' bureau was the most effective method of communication used.

Respondents who felt communication about consolidation had been too sparse in their school districts emphasized the importance of having adequate communication and counteracting the "rumor mill." At least one respondent from a school district where consolidation had gone smoothly emphasized strongly the need for educators to take a proactive role in making sure

that school district personnel and community members received needed information to take informed action concerning consolidation.

Fears Affecting Educator Morale

A pervasive theme in the responses to the study group's inquiry was the fear of change. As with any new venture, especially one as complex as the merger of two separate school districts, facing unfamiliar situations aroused a myriad of fears and anxieties. In several of the districts surveyed, school desegregation and consolidation were combined, adding to the general fear of the unknown. Half of those who completed the written questionnaire listed fear of the unknown as a factor in educators' morale. Respondents to the telephone survey talked more about the specific fears included as items in that survey. These were worries about job security, transfer issues, loss of current benefits, loss of special programs, loss of preconsolidation district strengths, and fear of inequitable treatment.

Job security. In three of the five districts surveyed by telephone interview, respondents reported that educators had feared for their job security. In one of these districts, teachers and administrators were notified during the summer that their contracts would not be renewed by the unified district but then were rehired before the beginning of the next school year. In the other two districts, fear of job loss was kept to a minimum, because educators were assured by the boards of education and/or governing bodies that there would be no loss of jobs. In the remaining two districts, there were written guarantees, reinforced by state law in both cases, that no positions would be cut.

In several districts, educators feared loss of tenure or failure to receive tenure on schedule, as a result of consolidation. In one district in particular, teachers feared that possession of seniority might jeopardize their jobs, because the unified district might not want to hire the more expensive teachers.

In general, respondents reported that central office staff had a more realistic fear of losing their jobs or having to take demotions than building level staff. In three of the districts,

respondents reported that there had been duplications in central office positions that eventually had to be resolved by giving some staff different positions than they had held previously, sometimes demotions to "assistant" status.

Transfers. In three of the five districts, respondents reported that educators feared involuntary transfers between schools. In one of these districts, the plan included the transfers of large numbers of both teachers and students, so that the fears were not that the transfers would happen but about the procedures that would be used in determining transfers. In the other two districts, fears of transfer were allayed when large-scale transfers did not occur. In two districts, respondents reported that educators expressed minimal concern about procedures for transfer, because transfer policies in the two original districts were very similar. In one of the other two districts where there was no reported concern, the question of transfers was never raised except that some teachers viewed consolidation as an opportunity for voluntary transfers across the former district lines. In the other district where educators did not fear involuntary transfer, they were assured ahead of time that there would be no transfers across former district lines.

Loss of current benefits. Fear of loss of job benefits as a result of the merger surfaced in three of the five districts surveyed, to varying degrees. Educators were concerned about such benefits as salary, seniority, tenure status, retirement plans, and insurance benefits. In two of the districts, respondents said that educators questioned the planners about benefits but were satisfied with the answers they received. In only one of the districts was major concern expressed about losing current benefits. In spite of state laws protecting certain benefits in this district, educators expressed much concern over specific benefit issues, such as loss of pensions, loss or delay of tenure status, and loss of promised raises.

In the two other districts where anxieties were expressed, fears were allayed rather easily; however, in at least one of the districts, educators expressed concern over insurance benefits or

discrepancies in insurance coverage between the two former districts. In one district, the plan called for adopting the higher of the two benefit schedules. In the other, the written agreement provided for educators to remain in their current benefit system and for newly hired teachers to go into a newly developed plan. Since the new plan provided better benefits than either of the two preceding plans, educators were allowed to transfer into it on a voluntary basis.

Loss of special programs. Consolidation of the curricula of the former districts was a concern reported by staff of four districts who responded to the written survey and by respondents from three of the five districts surveyed in-depth through telephone interviews.

In the written survey, respondents cited curriculum consolidation and improvement as one of the benefits of merger. One person specified that there had been fears, but they had made an effort to take the best of both former districts. Another said that a commitment had been made to continue all special programs from both former districts.

In the telephone survey, educators in three of the five districts reported that administrators and teachers were concerned that the best programs of both districts might not be continued. Not only were the current curricula of the two districts different, but there were a number of special programs that staff of each district valued, which might not be valued by the other. Both respondents from one school district reported that many special, federally-funded programs had been lost after consolidation. Both respondents from another district reported that only one program had been adversely effected to date, but final decisions had not been made at the end of the first year of consolidation as to the curricula and programs that would be supported by the unified district.

In one district, the teacher respondent spoke of fears of losses in areas other than curriculum. She said that an excellent relationship had existed between the teacher association and the central office staff in one of the previous districts. This relationship was in danger of being lost, as was a commitment to maximize the number of minority teachers in the school district.

Respondents from the other two districts reported that there was some initial concern about maintaining the strengths of the two former districts, but these fears were soon overcome. Both of these districts had extensive plans in place before the actual merger took place. There had been five years of preplanning in one of these districts. In the other, planning for consolidation began as soon as it was clear that a merger was going to happen.

Fear of inequitable treatment. In four of the five districts participating in the telephone surveys, respondents reported fears of inequitable treatment in personnel decisions under the newly-merged systems. This was especially true of administrators in those districts where central office staff shared positions initially, not knowing which person would continue in the position over the long term.

Several of the consolidations were not true mergers; rather, the city district disbanded and the county district assumed its responsibilities. In these situations, staff of the former city district reported feeling like stepchildren of the county district, feeling unwanted, and fearing they would not be adequately represented in the unified central office staff. Even in these situations, different respondents reported quite different feelings. For instance, a former city principal in one of these districts said that he quickly and easily established excellent relationships with the central office staff of the county district, even though he reported that most of his peers felt neglected and burned out.

In one of the districts where there were fears of inequity, a solution was arranged that was so effective that it is still in operation many years later. The superintendent established a Superintendent's Council composed of one teacher from each school, elected by the school staff, who met and continue to meet monthly with the superintendent. Educators may raise concerns, submitting questions ahead of time if they wish to remain anonymous or raising them at the meeting. Concerns that former city or county faculties were being favored and that principals and teachers had no input into central office decisions dissipated as a result of these meetings.

In another district, fear of inequitable

treatment did not arise because the professional association, which represented both teachers and administrators, had been merged several years prior to district consolidation and had taken leadership in selling the community on the merger. This led to a "honeymoon" period after the merger, when government leaders, school system leaders, and educators from both of the former districts cooperated.

Other concerns. Respondents from the five school districts surveyed in-depth reported a variety of other concerns. In two school districts, there was concern that funding might not be adequate to implement the ambitious plan of taking the best from both the former districts. Equalization of retirement benefits and pay emerged as concerns from four of the five school districts. Loss of identity and the need for major adaptation to different daily operations were cited as worries by another respondent. Fear of having a political patronage system influencing the schools for the first time was mentioned by a teacher respondent from another district. In one district, there was fear that the quality of education would be compromised because of the turmoil surrounding the massive changes in the schools. The administrator respondent reported that, indeed, test scores indicated student achievement did decline for a short time after consolidation.

Consolidation Obstacles and Accomplishments

Accomplishments. Since most respondents felt that consolidation had ultimately improved the school system, below are listed some of the benefits respondents felt the merger had accomplished. Equalization of services was listed as a major benefit by staff of three school districts, and curriculum improvement was listed by staff in two districts. Improved efficiency in funding requests was cited by three respondents, as was greater efficiency and fairness in operating the schools (for instance, students could be assigned and new buildings built without regard to the former district boundaries). Respondents from four districts felt that consolidation made school desegregation easier by helping prevent "white

flight." Finally, several respondents felt that consolidation had facilitated community development and city-county planning for expansion.

Obstacles. In all five of the school districts surveyed in-depth, respondents reported that some problems occurred in actual implementation of consolidation. In the section on educators' fears, it was reported that some of the fears had been actualized. These events will not be repeated here.

In the least problematic situation, educators had not feared consolidation but found that it was difficult to work out appropriate retirement benefits. It was necessary to amend the written plan for consolidation in order to solve this problem. Another unanticipated problem in this district was that teachers had a voice in choosing the superintendent hired to administer the unified district, but the teacher respondent said that they were disappointed in their choice. She felt they did not have adequate experience or training to make such a choice knowledgeably.

In the other four districts, respondents reported that some of the fears expressed before consolidation were realized, and some problems arose that had not been anticipated. In two of these districts, the problems were soon forgotten (for instance, duplications of administrative positions; reconciliation of differences in procedures, pay schedules, and curriculum; and institution of a longer school day). In the remaining two districts, major problems arose that were not easily resolved.

In one district, teachers felt so mistreated during the events surrounding consolidation that they went on strike the following year. This was the same district in which the administrator respondent suggested that the short time the district had for planning and implementing consolidation may have prevented even greater disruption, as it reduced people's opportunity to "build fences of emotion and fear." Ironically enough, the teachers' strike was reported by the teacher respondent to have helped unify the teachers from the two former districts and led to a much improved school district.

In another school district surveyed, there were many disputes and much litigation about educator benefits. While salary scales were eventually equalized, educators from the former

city school district took drastic salary cuts during the first year of consolidation, as much as \$5,000 for some administrators. This district, in the opinion of district respondents, also failed to resolve most of the questions concerning consolidation of the curriculum, duplication of administrative positions, and continuation of special programs during the first year of consolidation. For instance, a high school principal in the district reported that he did not know at the end of the first year of consolidation at what grade level the band program would start the next year. The teacher respondent reported that the policy concerning social promotion had been different in the two former school districts, with the result that some children who had been retained in the early grade levels were suddenly jumped several grades.

Respondents reported that in several districts teachers worked longer hours (in one instance for less pay). In at least one district, many teachers complained that there was greatly increased paper work, in addition to the difficulties of learning a different paper work system. Duplication of administrative positions caused problems with administrative leadership in four districts: inability to define who had specific responsibilities for program implementation, different or undefined procedures, poor organization of the central office, and breakdowns in communication.

Evidence of Morale Problems

In two of the five districts surveyed, respondents reported only the most minor evidence of morale problems associated with consolidation. In another district, a few teachers and administrators chose to retire earlier than they had planned because of uncertainty about the unified district. However, no grievances or suits were reported, perhaps because educators had been involved in the planning for consolidation.

In the remaining two districts, respondents reported that a number of educators had left the district in response to consolidation, some seeking jobs outside of education. Also, early retirements were reported as common in both of these situations. A large number of grievances had been filed over such issues as equalization of pay and benefits, pensions, violations of senior-

ity, denial of tenure, and inequities in the transfer policy. Both of these school districts are still involved in litigation arising out of the school consolidation process. Significant numbers of students were reported to have left the district in one instance, but most returned after

the community disruption had died down.

The five districts surveyed by the study group seemed to run the gamut from minimal evidence of loss of educator morale to evidence of major trauma for the educators in the school district.

District Efforts to Alleviate Morale Problems

ALL five school districts surveyed took some steps to alleviate educators' morale problems. Some of these steps have already been described, for instance, ensuring that the best salary, benefits, and curricula from both previous districts were retained. The Superintendent's Council that was established in one school district is another example of a successful method for alleviating educators' stress and distrust of change.

Respondents from one school district reported the least effort to alleviate morale problems: reassurance from the board of education and discussions with the staff. In another district, the teacher association sponsored staff development programs in the schools on topics

such as stress reduction, and the superintendent began a series of informal meetings with teachers in the teacher center. More elaborate workshops, retreats, and meetings were held in two of the districts. One district brought in human relations consultants to work with teachers and administrators, especially in the area of trust. In one district, districtwide faculty meetings were held through the medium of closed circuit television. The board members and superintendent addressed the entire faculty through this means. All of the communications between central administration and school staff, described in previous sections of this report, served to alleviate morale problems, in the opinion of respondents.

Study Group Recommendations

THE dominant theme of the information gathered from the surveys is that extensive planning before the merger actually occurs makes for a smoother, less stressful transition in city-county school district consolidation. Second only to planning is the importance of communication. Although the fear of the unknown surfaced in all five of the districts surveyed in-depth, the two districts that reported fewest problems were those in which planning prior to consolidation was extensive and involved teachers and principals as well as central administrators, and in which there was an extensive flow of communication among all concerned parties. It would appear that, when educators and the public express their ideas, concerns, and fears in the planning stage, they often become more receptive to and involved with changes that must occur to combine two or more separate districts.

Even in the two school districts that had the most difficult transitions, educators gave hopeful advice. As a teacher in one of these situations said, "It makes one sick to carry too many grudges," and "If it doesn't kill you, it will make you stronger."

Based on their review of the literature, analysis of the survey and interview data, and experience with consolidation, study group members offer the following recommendations for educators and community members considering city-county district consolidation.

Planning

- Legitimate reasons for consolidation (for instance, program improvement, equalization of services, or financial incentives) should be explained and widely publicized.

- The merging school boards should be mutually involved in planning for consolidation as far ahead of time as possible—a minimum of a year before the effective date of merger.

- A planning group that involves the community (for instance, the local Chamber of Commerce, affected professional associations, the PTA, city and county government) should be formed. Both boards of education; central office staffs, teachers, and principals from both districts; and professional consultants (as needed) should participate in the planning group.

- A timetable, which precedes and extends through the first year of consolidation, should be developed to outline specific changes in practice and policy.

- The consolidation plan should provide for equitable treatment of all affected parties.

- Within funding limits, the "best of both" districts—the higher salaries, better benefits, richer curriculum, better facilities, etc.—should be kept. Equalization of salaries, benefits, etc., should occur as soon as possible.

- Duplication of positions should be avoided to the extent possible; when duplication cannot be avoided, job responsibilities should be clearly delineated so that two persons do not have exactly the same responsibilities. When possible, duplication should be reduced through attrition.

- State legislators should enact legislation requiring that all of the preceding planning steps take place prior to the first year of governance by a consolidated board of education and administration.

Communications

- Public meetings and district personnel meetings should be held prior to consolidation for community and staff input into the planning.
- Thorough, ongoing communications from the school district should begin well before consolidation and continue until the two districts are completely merged and there is general acceptance of the unified district. Surveying is an effective method of determining what the public and school staffs need to know.
- The school boards of education, administrators, teachers, and professional associations should work proactively with all the communications media. School boards and educator associations should disseminate information about consolidation through newsletters and other means of providing community and staff with detailed information about the mechanics and benefits of consolidation.
- A consolidation hotline may be estab-

lished to inform the public and district personnel, to counteract rumors, and to reassure educators when fears are groundless.

- Counseling or communication sessions with human relations specialists may be employed to help students, teachers, and others cope with identity problems created by district consolidation.

Leadership

- There must be strong leadership from the superintendent(s) before, during, and after consolidation to generate support for the plan and for the unified district.
- Community leaders and/or professional association leaders should take leadership among citizens and colleagues to facilitate a smooth transition during consolidation.
- Administrators should continue to give warranted positive reinforcement to educators if fears emerge regarding such issues as job security or loss of benefits.

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Appendix A

Survey Instruments

TEA-AEL STUDY GROUP
School Consolidation Questionnaire

Please respond carefully and thoroughly to the following questions regarding school/district consolidation in your district. If you need more space than allowed, please use the back of the sheet or an additional sheet. Thank you.

1. Why did you consolidate schools?

2. Was the consolidation within the district or with another district?

3. What were the beginning and ending dates of your district's consolidation process? Is your district still involved in the process of consolidation?

4. Please summarize (chronologically, if possible) major planning steps to your district's consolidation.

5. Please describe any communications during the process of consolidation.
 - a. What communication with staff (all levels) was involved?

 - b. What communication with communities was undertaken?

c. Were students involved?

6. Have changes to district/school policies and/or practices been made due to consolidation? In what areas -- personnel, transportation, etc.? Please describe.
7. Have you assessed the effects of consolidation on students and community members? If so, how and what were your findings?
8. Was teacher morale affected by school/district consolidation? If so, in what ways?

9. Did communications between staff and administration become a problem? If so, how were problems overcome? If no, what steps were taken to avoid communication problems?

10. In your opinion, what were the three greatest obstacles to consolidation? How did your district or individual schools overcome these?

11. What were the three greatest accomplishments/benefits resulting from consolidation? Why were these significant?

12. Would you be available for a brief telephone interview for further information? If so, please provide below a school or home number at which you may be contracted and hours available.

Thank you for assisting the Knox County Education Association-Appalachia Educational Laboratory study group in our examination of successful school/district consolidation. You will receive a copy of the group's publication, which will summarize data provided and respect confidentiality of sources.

Please return questionnaire to: Jane Hange, Director
Classroom Instruction
Appalachia Educational
Laboratory
P. O. Box 1348
Charleston, WV 25325

INSTRUCTIONS FOR TEA-AEL STUDY GROUP
TELEPHONE SURVEY

INSTRUCTIONS

Please write responses in the space provided. Use the back of the paper if you run out of room.

1. Introduction: Use the following statement.

Hello, I am _____. I am a member of a study group sponsored by the Tennessee Education Association and the Appalachia Educational Laboratory. Did you read the letter we sent in advance explaining our project?

Notes (record response):

Probe: If the respondent says no, read him or her the letter, of which you will have a copy.

The study group is looking into concerns that arise when city and county school systems consolidate. We particularly want to look at the way teachers' and principals' morale is affected by consolidation. What we want to do is identify ways to address any problems educators have with consolidation so that any fears or anxieties can be eased as quickly as possible. Our plan is to write a short booklet for the benefit of staff in school districts that are considering consolidation. Before we start the survey, do you have any questions?

Notes (record response and answer the questions to the best of your ability--but, if you don't know the answer, say so, and refer the respondent to Pam Coe at AEL, 800/624-9120):

2. Clarify the timetable for the district's consolidation. You will have a brief timetable with a list of the sources from which we took it. Use the following statement:

We want to include a brief timetable of each district's consolidation in the booklet. I have a very brief timetable based on _____ [cite the sources for this district]. May I read it to you to make sure our sources are accurate? Please make corrections if anything is wrong. [If the respondent gives permission, read the timetable and record all comments the respondent makes about it.]

Notes (record response):

3. Questions

- A. Were educators (both teachers and principals) involved in the planning for consolidation, that is, planning activities conducted before the actual consolidation took place?

Notes (record response):

Probe: If the answer is no, ask: Were educators (both teachers and principals) consulted at all about planning for consolidation?

Notes (record responses):

If the answer is yes, ask: How were they involved?

Note (record response):

- B. The following issues have been mentioned as concerns educators have had in some school districts prior to consolidation. Would you tell me, for each issue, whether it was a worry in your district and, if so, how serious a worry?

Notes (record response):

a. Job security

b. Fear of transfers to other buildings

c. Fear of losing current benefits after consolidation

d. Fear of losing special programs

e. Fear of losing the strengths of current school organization

f. Fear of inequities in the way people would be treated under consolidation

- g. What other worries did educators have in your district?
Please be specific.

- C. In hindsight, were any of those fears justified, that is, did any of the feared situations occur in your district?

Notes (record response):

Probe: If the respondent says yes, ask: Would you describe those situations?

We've talked about concerns prior to consolidation.

- D. What problems, if any, surfaced during the actual consolidation process, particularly in the first year?

Notes (record response):

E. Now I am going to name some possible sources of information about consolidation. For each source, please answer the following questions:

1. Was this a source of information before consolidation for educators in your district?
2. Was this a source of information during consolidation for educators in your district?

Notes (record response):

a. television?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from television before consolidation; after consolidation?)

b. radio?

1. Before consolidation

2. After consolidation

(If yes, what information did educators receive from radio before consolidation; after consolidation?)

c. newspaper articles?

1. Before consolidation

2. After consolidation

(If yes, what information did educators receive from newspaper articles before consolidation; after consolidation?)

d. public meetings?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from public meetings before consolidation; after consolidation?)

e. newsletters?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from newsletters before consolidation; after consolidation?)

f. letters or memos (from whom)?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from letters or memos before consolidation; after consolidation?)

g. faculty meetings?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from faculty meetings before consolidation; after consolidation?)

h. other?

1. Before consolidation

2. During consolidation

(If yes, what information did educators receive from other sources before consolidation; after consolidation?)

- F. I will read you some ways educators have responded to consolidation in other districts. Please tell me if any of these things occurred in your district, and describe what happened.

Notes (record response):

- a. Voluntarily leaving the district in greater numbers than usual

b. Filing grievances

c. Bringing litigation

d. Were there other educator responses to consolidation in your district? Please describe.

G. Please describe to me any steps your district took to address educators' morale problems that were associated with consolidation.

H. Are there other issues, concerns, or solutions to consolidation problems that you would like to add?

4. Do you have questions?

5. Thanks. Use the following statement.

Thank you very much for participating in this survey. Your experience should be of real help to educators who will be facing consolidation in the future. We expect to complete the booklet by April. Would you like a copy?

If the respondent says yes, ask: To what address would you like us to send your copy?

Notes (record response):

Appendix B

Merger Chronologies

CHARLOTTE/MECKLENBURG COUNTY MERGER (North Carolina)

January, 1958: A Chamber of Commerce study (the Thigpen Study) recommended consolidation of the Charlotte City Schools and the Mecklenburg County Schools.

October, 1959: The two boards of education appointed a committee of three members from each board to study consolidation. The committee recommended consolidation.

April 21, 1959: The North Carolina General Assembly adopted a special act providing for merger of the two school districts. The act provided that the two school boards be merged into one twelve-member board effective July 1, 1960. Thereafter, prior to the expiration of current terms of office, one board position would be eliminated in December 1960, one in 1962, and one in 1964, to form a final nine-member board.

June 30, 1959: The voters of the city and county approved consolidation effective July 1, 1960.

March 8, 1960: The city board of education petitioned the county board for merger.

March 24, 1960: The county board accepted the city board's petition.

April, 1960: The State Board of Education approved the merger.

July 1, 1960: Effective date of merger.

Source: April 21, 1959, special act by the North Carolina State Legislature and information from the North Carolina Department of Education

NASHVILLE/DAVIDSON COUNTY MERGER (Tennessee)

1957: The Tennessee State Legislature created a Metropolitan Charter Commission for Nashville City and Davidson County to develop a charter for merger of all governmental functions, including the two public school districts.

1958: A public referendum on the charter developed by the Charter Commission was conducted. The referendum was defeated, although it was passed by Nashville city residents.

June, 1962: In a second referendum, the voters in Nashville and Davidson County voted to create the Metropolitan Government of Nashville and Davidson County, effective April 1, 1963.

June, 1962: A temporary Board of Education was established for the Metro School District to preside over the transition to a merged district.

July 1, 1964: Effective date of merger. The permanent school board became the official governing body of the merged school district.

Source: Schmidt, et al. (1977)

WINSTON-SALEM/FORSYTH COUNTY MERGER (North Carolina)

December, 1962: Committees were formed by the city and county governments to study the problems involved in school district merger.

The state legislature passed enabling legislation to authorize a referendum by the citizens of Forsyth County, including those in the city of Winston-Salem.

A committee was appointed to inform the public about consolidation and the need for merger.

A referendum was held, and the citizens voted to merge the Forsyth County Public Schools and the Winston-Salem City Schools.

The referendum provided for merging the two existing boards of education (a five-member county board and an eight-member city board). The number of positions was reduced by attrition until the current eight-member board was achieved.

The merged board of education appointed a new superintendent, who selected administrative staff from the two former districts.

July 1, 1963: Effective date of merger.

After merger, each assistant superintendent or department head organized a committee to recommend necessary changes for the consolidated departments. The process of making all the personnel and operational changes continued until about July, 1966.

Source: Eugene Johnston, retired principal and administrator, Forsyth County Public Schools

LOUISVILLE/JEFFERSON COUNTY MERGER (Kentucky)

The initial action in Louisville-Jefferson County school district consolidation was a law suit, filed by the Kentucky Civil Liberties Union and the NAACP, to require annexation into the city school district of all areas outside the current school district boundaries but inside the city limits to facilitate school desegregation.

March, 1973: The district court dismissed the suit.

July, 1973: The U. S. Court of Appeals for the Sixth Circuit declared the Louisville and Jefferson County school districts merged and ordered a specific busing plan. This order was vacated two days later when the Supreme Court remanded the case to the Sixth Circuit in view of recent decisions not requiring cross-system busing.

Meanwhile, the Louisville Board of Education was in increasing financial difficulties and desired merger to lessen the financial burden on the city.

February, 1974: The Louisville Board of Education passed a resolution requesting merger with Jefferson County Public Schools. The Jefferson County Board of Education denied the request.

November, 1974: The Louisville Board again passed a resolution requesting merger with Jefferson County, and the county board again denied the request. The Louisville Board of Education then appealed to the State Board of Education, which ordered the merger effective July 1, 1975.

April, 1975: The city board of education announced publicly that it was closing.

July 1, 1975: Effective date of merger.

July, 1975: The Court of Appeals issued a writ of mandamus directing the merged Jefferson County district to implement a full-scale desegregation plan by the opening of school in September, 1975.

September, 1975: The school districts had merged and had begun to implement the required desegregation plan.

Source: Schmidt, et al. (1977)

KNOXVILLE/KNOX COUNTY MERGER (Tennessee)

January, 1986: City Council began exploring the idea of merging Knoxville City Schools with the Knox County Public Schools.

February, 1986: City Council adopted a resolution creating a 26-member committee to develop a plan for consolidation. Adoption of the plan would require approval by the city school board, city council, county school board, and county commission.

March-May, 1986: Subcommittee meetings were held, administrators of the two districts met, and plans were developed but failed to gain the approval of all four governing bodies. The committee chair resigned, and the committee stopped functioning.

August, 1986: Shortly before the November election, the City Council added to the ballot amendments to the city charter deleting references to a city school district. This would have the effect of closing the city district.

September-October, 1986: Panel meetings were held in the city as part of the election campaign.

September-October, 1986: The county school board continued to work with interested citizens to develop a plan of consolidation. It adopted a plan and influenced the county commission's approval of the plan. A city school board member submitted that plan to the state education commissioner for his approval. The state commissioner approved the plan "with reservations" concerning staff pay and benefits.

November, 1986: The city voters approved the amendments deleting references to a city school district. Only city voters, not those in the county, were able to vote on the amendments.

November, 1986-May, 1987: The two boards of education and two administrative staffs began to prepare for merger by developing a new table of organization, combining inventories of equipment and textbooks, etc. Very little of the consolidation plan prepared by the county in the fall was implemented.

May, 1987: The county law director filed suit in Chancery Court for a declaratory judgment relating to the two negotiated contracts, tenure, city pension plans, and other matters. Several other parties joined the suit.

June, 1987: The Chancellor ruled on the suit, generally upholding the rights of the city teachers to maintain current benefits and ruling that both contracts be honored with the educators affected by them until the terms of their contracts expired.

July 1, 1987: Effective date of merger. The city school district ceased to exist, and the Knox County Public Schools assumed by default the responsibility for educating city children.

July, 1987-January, 1988: Appeals of the Chancellor's decision were filed by the county board of education to the Appellate Court. A decision generally sustaining the Chancery Court ruling was rendered December 28, 1987. In January, 1988, appeals were filed to the state Supreme Court. The appeals are pending.

Source: Records of the Knox County Education Association

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